

Markers of Effectiveness: Building Organizational Effectiveness Capacity within the Training System

The “*Markers of Effectiveness: Building Organizational Effectiveness Capacity within the Training System*” offer guidelines to help organization leaders understand how their training system can operate most effectively to provide the strategic support necessary to achieve the organizations mission.

When building its capacity to provide technical support, the Training System needs to recognize that it has an opportunity to influence the organization’s strategy, structure and culture, key processes, and operations OE work. By extension, it can influence the organization’s inter-departmental collaboration needed to improve outcomes. The following markers were developed by the *Building OE Capacity Work Team* to explain the essential components of a redefined Training System that incorporates both traditional and OE-related tasks:

1. Continuing to develop internal skill sets for curriculum development and delivery

Training System staff must include training professionals able to develop and deliver traditional training that meets the organizational needs. “A New Key to Success,” a publication of the National Staff Development and Training Association (NSDTA), provides guidelines for optimal Training System staffing for organizational development work that supports the organization’s programs goals, objectives, and priorities. The key players engaged in the development and implementation of the training program include training unit staff, organization staff, community members, and university training partners. APHSA’s Markers of Effectiveness are consistent with the NSDTA’s position that successful training programs need to be seen as having an integral role in the larger organization’s structure and purpose. (See NSDTA document, p. 3)

2. Developing OE Strategic Support Function Capacity

The performance of non-traditional OE support functions requires staff with training platform skills and OE technical expertise. Staffing levels and skills should align with the OE work the Training System is being asked to take on and the organization’s larger OE priorities.

Staffing levels need to be such that OE specialists have the time and availability to work “on-site” with leadership and work teams throughout the organization. OE specialists need time to prepare for team meetings and process information for the team following meetings. By means of meetings with teams to develop, implement, and monitor complex and long-term improvement plans, OE specialists model facilitation and planning behaviors the organization desires. In doing this work OE specialists draw on new OE facilitation skills as well as their own experience within the Training System.

3. Creating strategic alignment with OE initiatives

As the organization’s Leadership Team creates strategic alignment between the organization and the Training System, the Training System has opportunities to do the following:

- Develop a strategic playbook that links the goals, objectives, priorities and activities of the training system to the overall vision, mission, values, and practice standards of the organization;
- Establish Training System standards, products, services, and day to day operations that reflect the organization’s mission and values and a structure to support the key OE initiatives and projects;
- Participate as a member of the organization’s management team to provide expertise and guidance on the strategic direction and facilitating the discussion toward OE goals;
- Establish boundaries and role clarity within the training system on how it will interface with the organization, specifically around:
 - Inclusion of training staff on organizational work teams
 - Decision-making on priorities within the training system
 - Leadership styles demonstrated in the training system
 - Create a balance between what time and energy the training system spends directly with the organization and what it does internally
 - Develop and implement communication plans and processes between the training program and the organization management team
- Develop key processes within the training system from the organization’s point of view, which supplement and complement the existing training program operations and serve the need of the training system and the organization, such as forecasting resource needs based on comprehensive needs assessments;

- Facilitate meaningful planning in support of the organizational development efforts and coordination of activities at all levels of the organization; and
- Foster the growth of learning organizations by developing an integrated evidence-based approach to professional development that includes both formal and informal learning opportunities.
- Facilitate collaboration among agency components that perform the support functions tasks. Facilitation Skills are different than typical training or platform skills and are crucial to the success of any OE specialist. Skilled OE facilitators must be comfortable leading groups through system assessments and problem solving and planning while keeping groups on task with a balance of safety in the room and accountability for the work. This must be done while using the participants in the room as the subject matter experts of their own system.

Further information on facilitation skills can also be found in the following resources; APHSA's Organizational Effectiveness Handbook; "The Skilled Facilitator" by Roger Schwarz, Jossey-Bass, Inc publisher, 1994; "Best Practices from the Leading Organization in Facilitation" Jossey-Bass, 2005; and, "The IAF Handbook of Group Facilitation" by Sandy Schuman.

4. Developing and delivering products and services that are outcome focused, evidence- based and focused on continuous improvement efforts

As the Leadership Team begins to accomplish the strategic alignment between the organization and the training system, the training system has opportunities to provide the following services to improve strategic alignment:

- Develop and deliver products and services that are aligned to advance the organization's strategy for culture change to achieve positive outcomes for children, youth, families, adults and communities;
- Develop key processes and operational practices to facilitate the implementation of OE initiatives;
- Deliver formal structured classroom training for staff at all levels of the organization and key stakeholders that supports the outcomes identified in the organizations strategy;
- Provide informal learning opportunities (such as facilitated team dialogue and learning, e-learning, distance learning, and webinar) for staff at all levels of the organization and key to advance the OE initiatives;

- Establish methods to define products and services of the training system and how they support the strategy of the organization;
- Establish methods to conduct organizational needs assessments and develop and deliver timely, relevant, and actionable training, technical assistance and consultation plans that are based on the assessments and articulate how products and services appropriately match the needs of the organization-staff, support continuous improvement efforts, and promote positive outcomes for the clients;
- Establish methods to continually scan for best practices and innovations in the field in efforts to provide consultation and facilitated discussions on how to effectively implement these practices;
- Deliver an array of quality products and services, addressing a variety of learning styles, in a timely manner, to create a learning organization and support the overall operations and effectiveness of the organization including:
 - Individual and organizational needs assessment
 - Outcome focused curriculum resulting in transfer of learning
 - Facilitated learning opportunities, using a systematic and systemic approach to utilizing information and feedback to plan for meaningful improvement to advance OE initiatives
 - OE resource guides, tools, and templates
 - Training opportunities for staff at all levels of the organization and key stakeholders; foster, adoptive and kinship parents; and families on regulation, policy, procedure and basic knowledge and theory content
 - Technical assistance and consultation for staff at all levels of the organization and key stakeholders; foster, adoptive, and kinship parents, and families,
 - Technical assistance grounded in building learning organizations and using feedback on lessons learned as an opportunity for improvement to support transfer of learning and advance OE initiatives
- Employ experts within the training system to perform traditional training services such as curriculum development and delivery experts
- Employ OE experts within the Training System that can develop and deliver facilitations concentrated on OE goals
- Engage the training system OE specialist in daily efforts of the organization, which would require spending the majority of time on the

development and delivery of OE products and services that meet the specific needs of the organizations, and

- Use teams and collaborative efforts in the development of all training system services and products, including participation by:
 - Staff from all levels of the organization it supports,
 - Key partners (e.g. community providers, university social work programs, families served by organization, and political and business leaders),
 - Other agency staff involved in support functions (e.g. technology, human resources, policy), and,
 - Staff from within the training system.

5. Building and demonstrating engagement skills

As a member of the Leadership Team, which conducts sessions to discuss OE improvement plans and/or is considering implementation of new initiatives, the Training System OE representatives have opportunities to demonstrate the following engagement skills:

- Bring to the table expertise specific to the most current OE models, tools, and practices;
- Facilitate the work of continuous improvement that is based on organizational needs assessments, conducted with the use of “learning by doing” approach;
- Effectively "contract" services with the organization leaders in ways that lead to the expected follow-through related to the Leadership Team decisions and desired impact on the organization outcomes; and,
- Facilitate informal learning sessions and transfer of learning with staff within the organization.

6. Monitoring Effectiveness of OE initiatives and measuring impact on agency performance and client outcomes

When making decisions, the Leadership Team may rely on the Training System, as one source, to monitor OE initiatives and collect and analyze program data generated by the organization and the Training System to assess the effectiveness of the OE strategy and make recommendations for improvements. In performance of this task, the Training System has opportunities to demonstrate expertise in the following areas:

- Establish guidelines for monitoring performance, impact, and effectiveness of the training system and how data and feedback on lessons learned will be collected and used to continuously improve the training system;
- Establish guidelines for the analysis and interpretation of client outcomes data, generated by the organization, and the use of such analyses to develop recommendations for OE improvements;
- Establish guidelines for using data collected by the organization on client outcomes and client satisfaction feedback to influence the training system's delivery of OE support services, curriculum development, and delivery of the traditional training function;
- Establish guidelines on using data and lessons learned feedback collected by the training system that can lead to future learning opportunities and support continuous improvement for the organization;
- Establish guidelines on using data and lessons learned feedback collected by the organization's other strategic support functions that can lead to future learning opportunities and support continuous improvement of the training system and the organization;
- Establish guidelines to generate data from embedded evaluation during classroom training as well as evidence based practice research to address training curriculum as well as OE issues;
- Establish guidelines to generate data and lessons learned feedback from transfer of learning, technical assistance and consultation efforts to address training development as well as OE issues;
- Establish guidelines to conduct "learning assessments" ; generating data and lessons learned from the organization and individual staff on the impact of training system efforts on building the performance and performance capacity of the organization through various learning opportunities; and,
- Create a feedback system using quantitative and qualitative data that scans for lessons learned, including both strengths and gaps, from the product development and delivery process, using data to continuously improve both OE supports and curriculum development and delivery.

When the markers are implemented, the Training Systems can contribute to continuous improvement by doing the following:

- engaging the organization in a facilitated decision making process that creates pathways toward the adoption of improvements;

- communicating excitement, possibilities and details about continuous improvement to those internal and external to the organization;
- bringing expertise around best practices and standards of operation to the organization, relying on the expertise in the organization to reach conclusions on how the best practices and standards apply in the organization; and
- providing tools and techniques to reconcile and resolve disparate points of view.